

# **AARP Foundation** **TAX-AIDE**

Free tax assistance for those who need it most

AARP Foundation Tax-Aide offers free, individualized tax preparation for low-to moderate-income taxpayers - especially those 50 and older - at nearly 5,000 locations nationwide.

**AARP Tax-Aide will be providing this service February 1 to April 15, 2019, at the following locations. ALL locations are handicap accessible. Site hours are subject to change on a weekly basis. Therefore, please call the day before you plan to go to the site.**

## **Leon County Public Library (Main branch)**

200 West Park Avenue  
850-606-2665  
First floor, program room B  
Walk-ins welcome  
Monday-Saturday  
1:00-4:30PM  
Handicapped and seniors given priority  
No appointments  
Tax preparers do not accept phone calls

## **First Presbyterian Church**

110 North Adams Street  
850-222-4504  
Walk-ins welcome  
Tuesday, Friday  
10:00AM-4:30PM  
Handicap accessible but no handicap parking

## **Tallahassee Senior Center**

1400 North Monroe Street  
850-891-4030  
Appointment required  
Monday-Friday  
1:30-4:30PM

## **Capital City Christian Church**

6115 Mahan Drive  
850-877-7315  
Walk-ins welcome  
Monday, Tuesday, Thursday  
5:00-9:00PM

## **All Taxpayers must bring the following tax documents to the AARP Tax-Aide sites:**

1. Social Security cards for taxpayer, spouse and all dependents listed on tax return. Social Security statements may be used in lieu of social security cards.
2. All income documentation including W-2 wage statements; 1099 statements for pensions and IRA distributions; interest and dividend statements; stock sales including cost basis; and self-employment documentation, if applicable.
3. Prior year tax return.
4. Dependent care information including name of caregiver with address and federal identification number.
5. All direct deposits and debits require a check or official bank statement containing both bank routing number and taxpayer account number.
6. Valid picture ID for taxpayer and spouse.
7. All receipts, cancelled checks, and other supporting documentation for all claimed deductions and credits.
8. Form 1095-A (Health Insurance Marketplace statement) and any letter of exemption.

# What AARP Foundation Tax-Aide can do for you today

We offer free in-person tax preparation to anyone who needs it. AARP Foundation Tax-Aide volunteers are trained to assist you in filing many income tax forms and schedules. However, the Volunteer Protection Act requires that our volunteers stay within the scope of tax law set by the IRS for the program.

**In certain situations, our volunteers may be unable to provide assistance.**

## We can prepare most returns with:

- Wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits
- Self-employment income if no employees, no inventory, no losses, no depreciation, no business use of home, and no other complicating factors
- Most income reported on Form 1099-MISC
- Schedule K-1 that includes only interest, dividends, capital gains/losses or royalties
- Qualified Business Income deduction if no complicating factors
- Itemized deductions, including noncash contributions to charity that total no more than \$5,000
- Cancellation of nonbusiness credit card debt
- IRA contributions — deductible or not
- Most credits, such as earned income tax credit, education credits, child/additional child credit and credit for other dependents, child/dependent care credit, premium tax credit, simplified method foreign tax credit on investments, and retirement savings credit
- Repayment of first-time homebuyer credit
- Estimated tax payments
- Tax on a Child's Investment and Other Unearned Income (Kiddie Tax)
- Injured spouse allocation, depending on state
- Health Savings Accounts (HSA)\*
- Amendments to filed returns
- Prior three tax years' returns

## We cannot prepare returns with:

- Self-employment expenses that exceed \$25,000
- Complicated capital gains/losses, such as futures or options
- Rental income, except land-only rentals\*\*
- Royalty income with expenses if not from self-employment
- Farm or farm co-op income or expenses
- Moving expenses\*\*
- Some investment income or itemized deductions that are not included in our training
- Alternative Minimum Tax, Additional Medicare Tax, or Net Investment Income Tax
- Foreign financial asset reporting requirements
- \* HSA: Only when volunteer is certified in the HSA module to prepare, and another volunteer is certified to review, a return that includes HSA contributions or distributions
- \*\* Rental or moving: Can prepare for active military personnel when volunteer is certified in the military module to prepare and another volunteer is certified to review

*AARP Foundation Tax-Aide service is offered in conjunction with the IRS.*

1-888-227-7669 [aarpfoundation.org/taxaide](http://aarpfoundation.org/taxaide)

**AARP** Foundation  
For a future without senior poverty.